Add a Client

- ✓ Check Client List
- ✓ Create Client Profile
- ✓ Add Alternate Name
- ✓ Add Address
- ✓ Add Additional Info
- ✓ Add Collateral Contacts
- ✓ Add Other Numbers
- ✓ Intake

Add Client

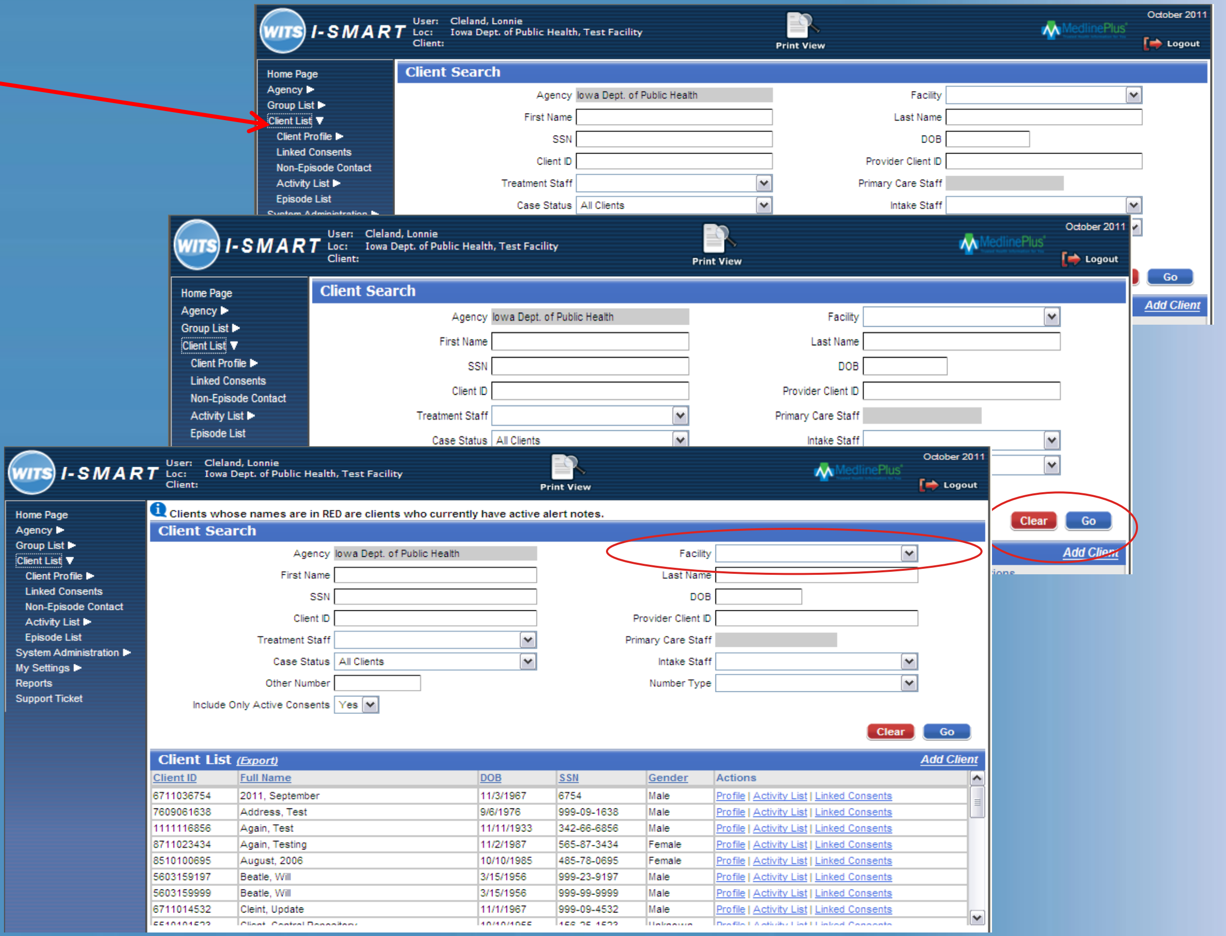
Check Client List

1. **Navigate to Client List:** Select the **Client List** menu item.

2. Initially the **Client List** will not show any clients. If you click **Go** without entering any search criteria the **Client List** will show all clients for the Agency if that number is less than 1,000. If your agency has more than 1,000 clients, you will be directed to select search criteria.

3. If you enter any search criteria and then click **Go** the **Client List** will show clients based on the search criteria you entered.

4. Note that the **Facility** field in the **Client Search** portion of the screen defaults to blank. Choosing a facility in the Facility drop down and clicking Go will yield only clients associated with that facility.



Add Client

Check Client List

6. **Check Client List:** Before adding a client to I-SMART, you must first check to see if they have already been added to the system by another user. Scan the list for their name or use the **Search** feature.

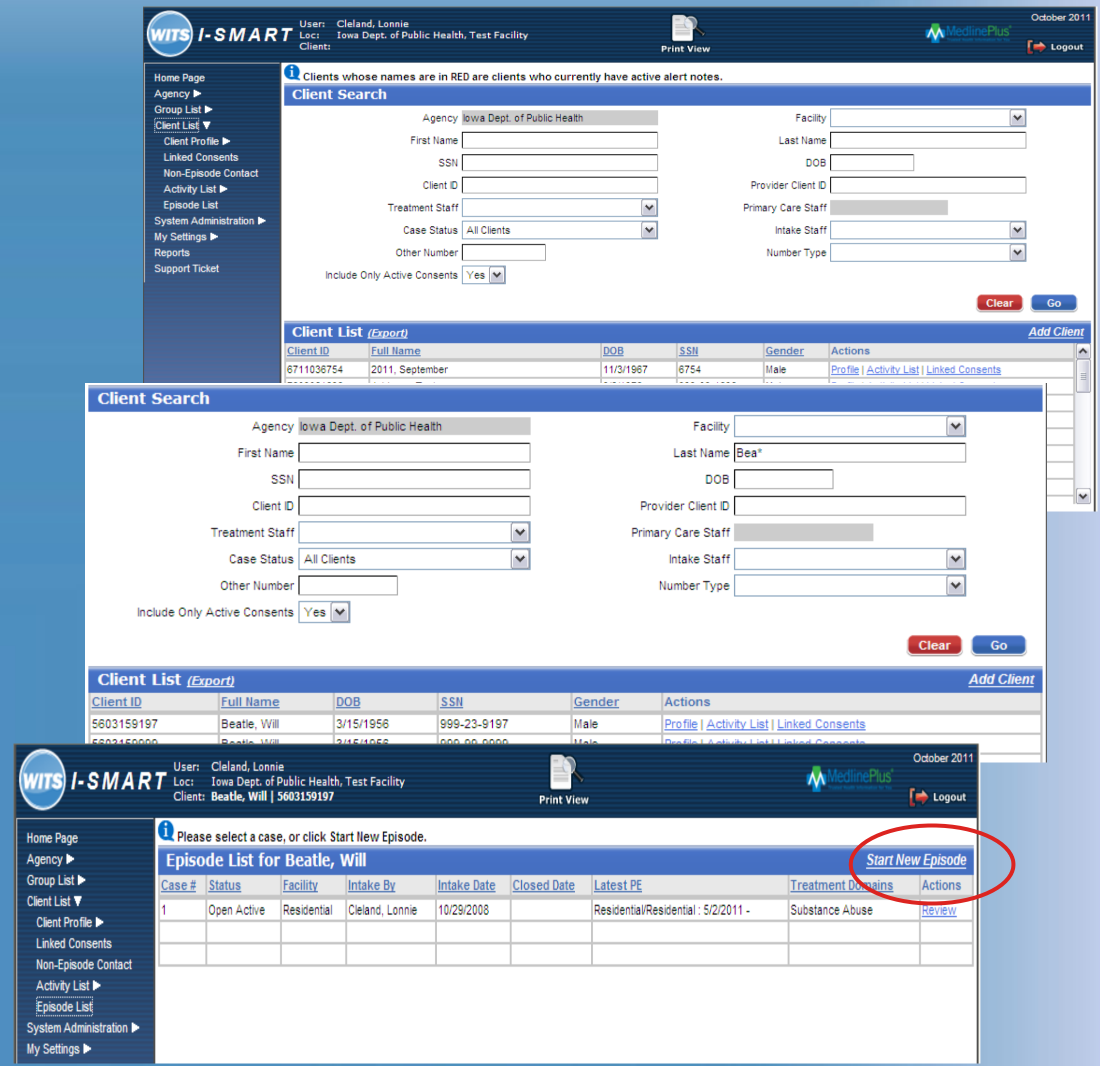
7. To search by **First Name**, **Last Name**, **SSN**, **DOB**, **Client ID**, or **Provider Client ID** type the information into the appropriate field and click **Go**

8. To search by **Case Status**, **Staff**, or **Facility** select the **Case Status**, **Staff** name, or **Facility** from the drop down list and click **Go**.

9. You can search using partial information by using the *. For example, if you want to find all clients whose last name begins with Bea type Bea* into the **Last Name** field and click **Go**. The list will only show clients with a last name beginning with "SM".

10. Selecting **All Clients** in the **Case Status Field** will ensure both active and closed records are checked.

11. If the client is not listed, proceed to **<u>Add Client</u>**. If the client is listed, click on **<u>Profile</u>** to be sure that it is in fact the same client. If it is the same client then you do not need to add the client to the system. Only one client profile exists per agency in the system. Click **Activity List** to see the **Episode List**. Use the **Start New Episode** hyperlink to open a new case at the current facility.



Add Client

Create Client Profile

12. **Entry Steps:** Check Client List

13. **Add Client:** You have already determined that the client has never been to any Facility within your agency. Click the **<u>Add Client</u>** hyperlink in the Client List portion of the screen.

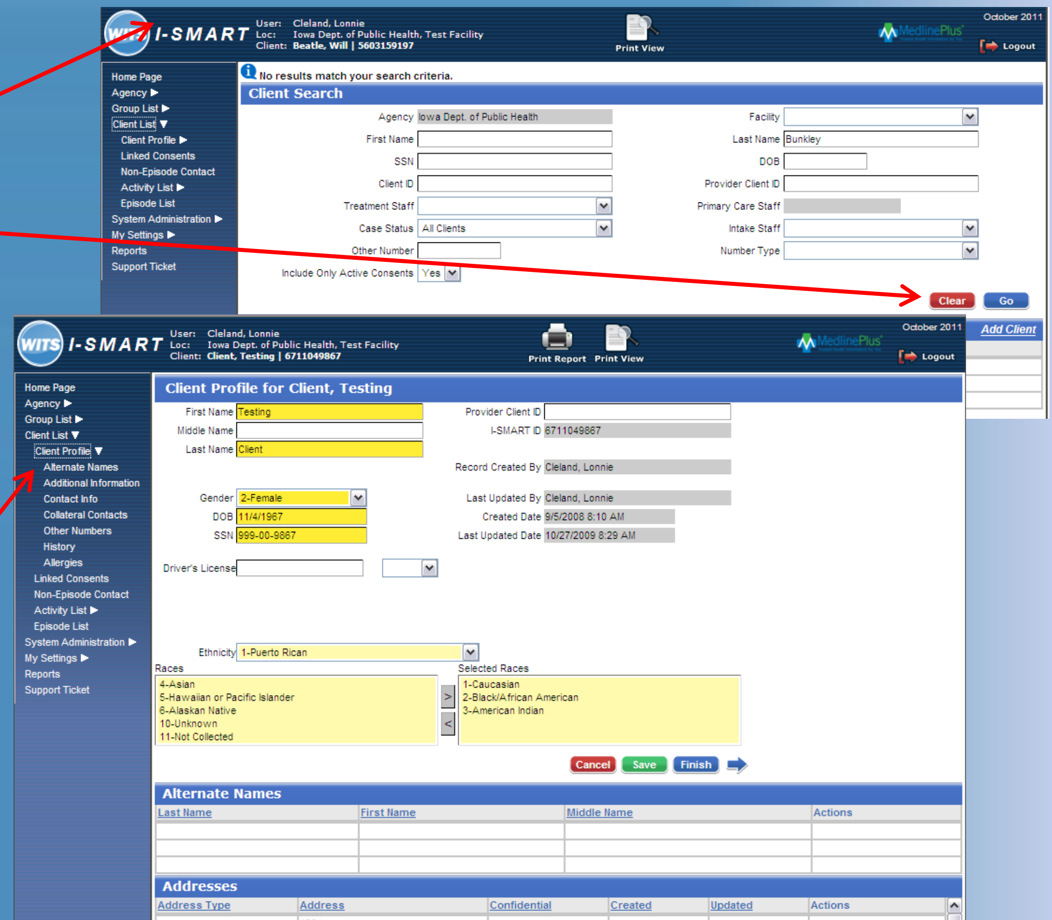
14. **Client Profile:** Some fields in the **Client Profile** are required. These fields will be highlighted in yellow.

Note: SS#:

- If the client has no SS# or if it is unknown the user can create a number by using the format 999-00-0001, 999-00-0002, etc. The agency will have to keep track of SS#'s it creates just as was done with SARS.
- The user can also enter just the client's last 4 SS3 digits.

12. After completing the upper portion of the screen, click **Save.** You are now ready to add **Alternate Names** or **Addresses**. Using the Next arrow will move the user to the Alternate Names screen.

Note: All system-required fields are highlighted in yellow. Fields required for state reporting are highlighted in a softer yellow.



Add Client

Add Alternate Name

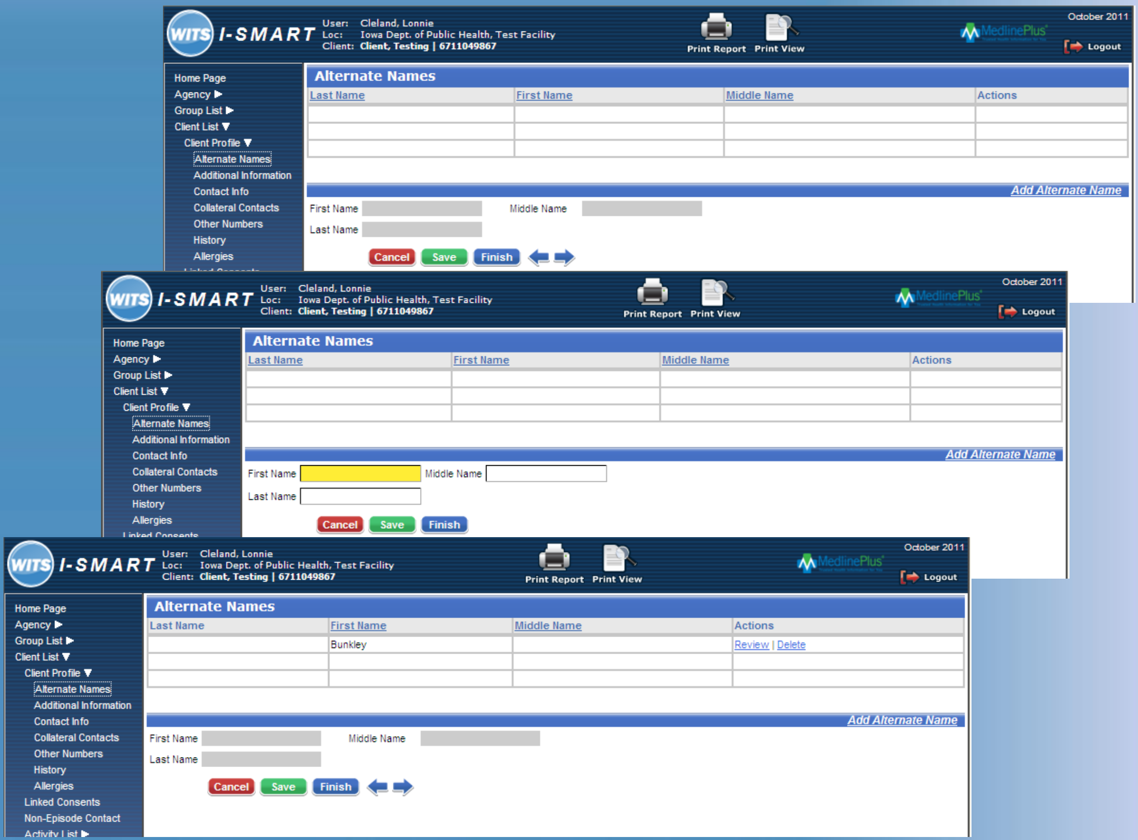
16. When you have completed the **Client Profile** screen, click **Next**. You will launch the **Alternate Name** screen. Click the **<u>Add Alternate Name</u>** hyperlink.

17. Enter any other names the client uses. Collect as many names as you can to ensure they are not entered in the system under another name in the future.

18. If you wish to add multiple **Alternate Names**, Click **Save** to store the name in the **Alternate Name** table at the top of the screen. The fields in the bottom portion of the screen will gray out, and you will see the name stored in the table. You must click **<u>Add Alternate Name</u>** for each new entry. When you have entered the last **Alternate Name** entry, click **Save** then **Next** .

19. **Edits:** You may use the **Review** and **Delete** hyperlinks in the **Actions** column to edit any **Saved** entries.

Note: Clicking on **Next** automatically saves the information and moves you to the Additional Information screen.



Add Client

Add Additional Info

25. Entry Points: Click on the **Next** button in the **Contact Info** screen or click on the **Additional Information** sub-menu.

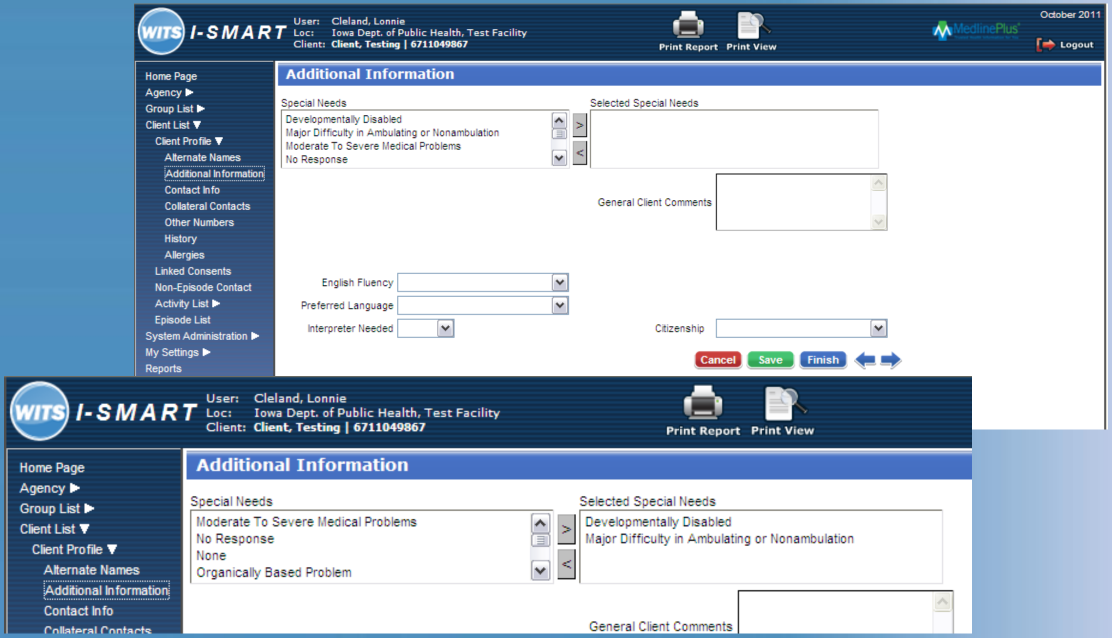
26. Using your mouse, click on your selection in the mover box. You may hold the Ctrl key down and either drag the mouse or click on separate choices to make multiple selections at the same time. When you select the item, its background will turn dark.

27. Click on the right pointing arrow located between the mover box to move your selections to the **Selected** box to the right. Your selections will be moved to the **Selected** box.

28. To remove a selection from the **Selected** box, click on the items you want to move and use the left pointing arrow located between the mover boxes. Your selections will be moved back to the original list box on the left.

29. Use your mouse to select values in the drop down boxes such as Ethnicity. Drop down boxes are designed to allow only one response in the fields.

30. When you have made all your selections, click **Next. Next** launches the **Contact Info** Screen.



Add Client

Add Addresses

20. Click on the **Contact Info** menu item, or click **Next** in the **Alternate Name** screen.

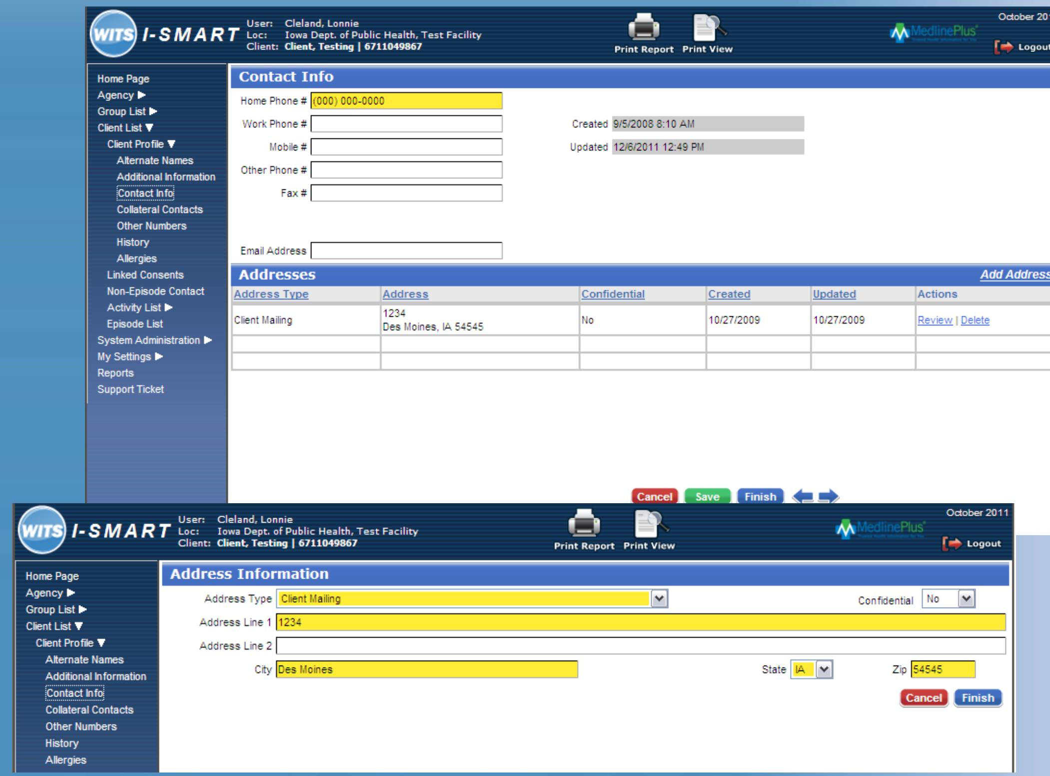
21. **Phone Numbers**: Add phone numbers as appropriate to the top of the screen. You may erase phone numbers using the backspace key.

22. **Addresses**: Click the **<u>Add Address</u>** hyperlink which will take you to a new screen for entering the information. Add an address. Click on **Finish** when you are done entering the information. This will take you back to the **Contact Info** screen with the address you just entered saved under **Addresses**.

23. Click on **<u>Add Address</u>** to enter each new address.

24. Click **Finish** to add each new address to the Address List.

Next at the Contact Info screen launches the Collateral Contacts screen.



Add Client

Add Collateral Contacts

31. Click the **Add Contact** hyperlink to insert contact data. This is the place where you can document the details about all people associated with the client outside the agency.

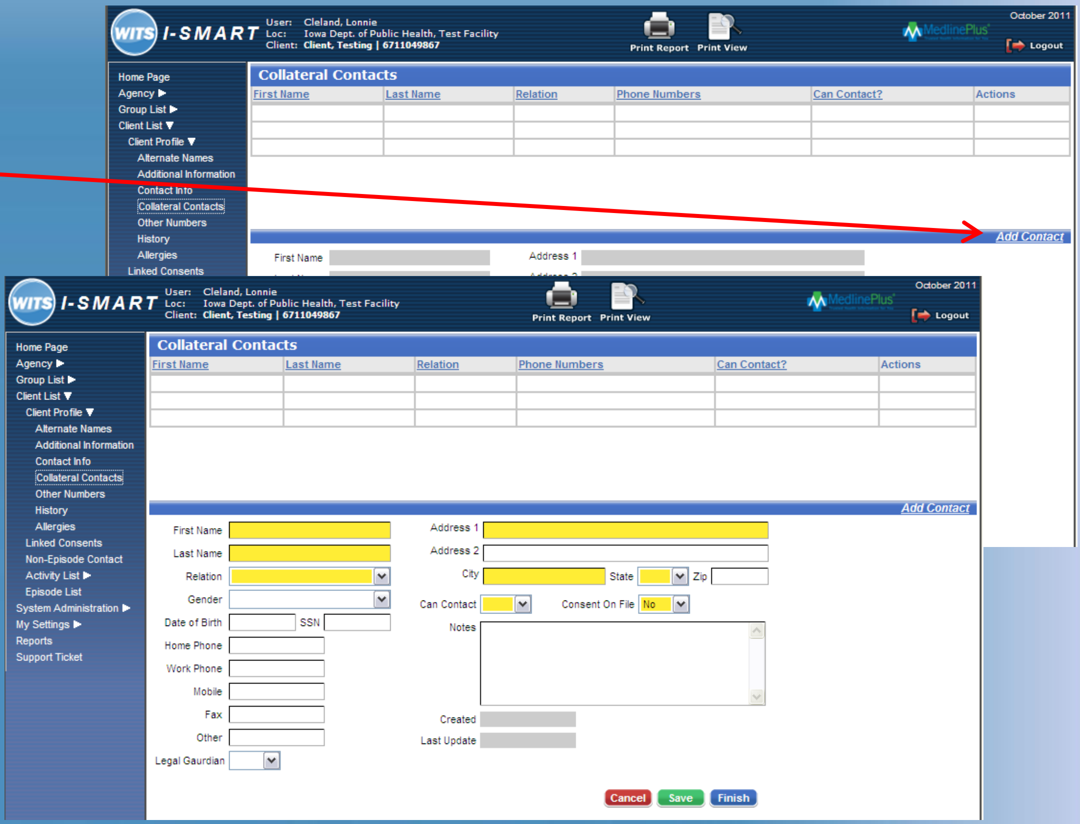
32. The **Can Contact** field asks the client if the provider can contact this person for any reason.

33. If you need a signed consent to be able to contact this person, complete the consent in the consent module and then select **Yes** on this screen for the **Consent On File** field.

34. When you have made all your entries for a contact, click **Save** to store them in the table**.**

35. When you have saved all contacts, click **Finish** to return to the **Client List** screen**.**

36. Review the information in the **Client Profile** screen. If correct, Click **Finish** to return to **Client List** where you will see your new entry listed alphabetically in the **Client List**. Or you can proceed to do the Intake from the **Client List** screen by clicking on the **Activity List** menu item.



Add Client

Other Numbers

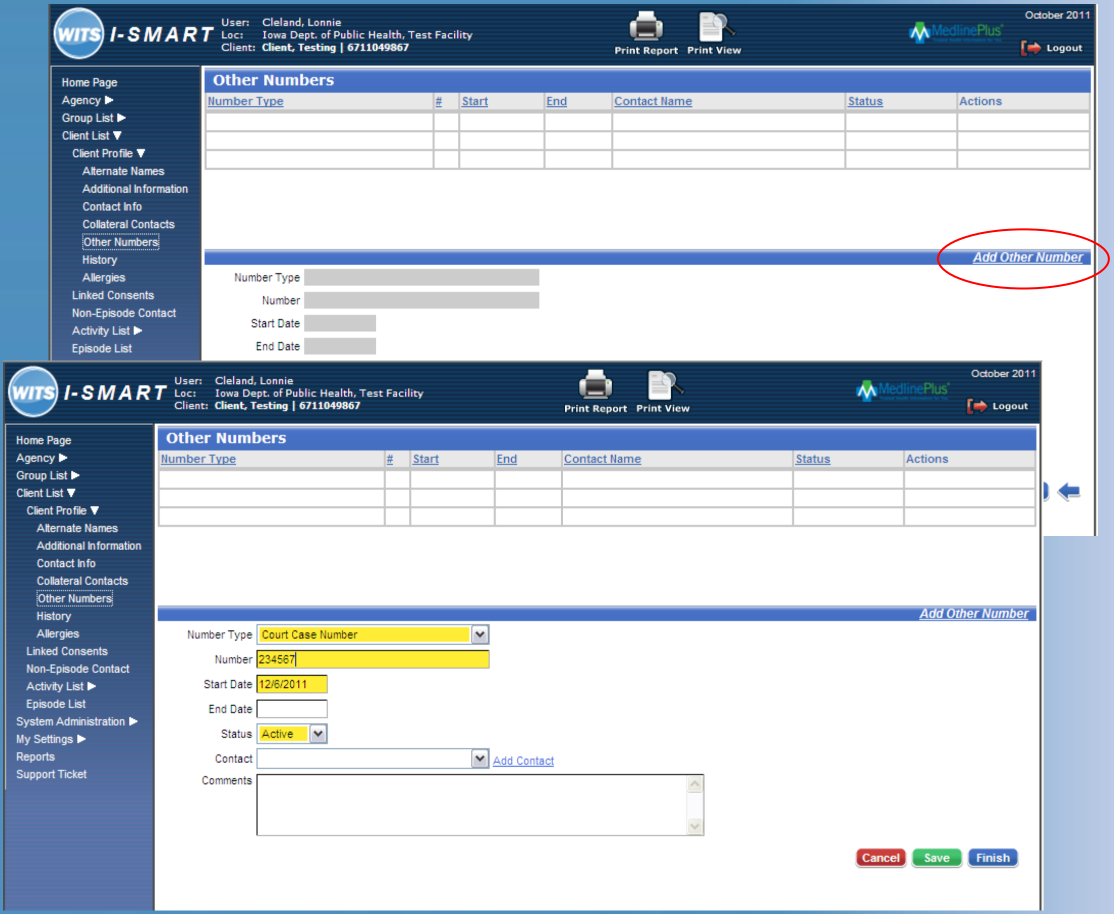
37. Click the **Add Other Number** hyperlink to insert court case numbers and related numbers.

38. **Number Type** and **Number**: Select the number type from the drop down list and enter the appropriate number.

39. Enter other information as needed.

40. Click **Save** to move the information you just entered to the list on top.

41. Click on **Add Other Number** for each new entry. You can save multiple numbers for a client.



Add Client

Intake

42. Entry Steps: **Client Profile**

43. Once **Client Profile** is complete, you are ready to **Intake** the client. **Intake** is the beginning of a new treatment episode and is required to be completed before any other clinical activities can be recorded.

44. **Intake** can only be completed if the client has no record at the facility, or all previous cases have been closed. When you click on the client's **Activity List** hyperlink, you will get a message window indicating the case status for the client.

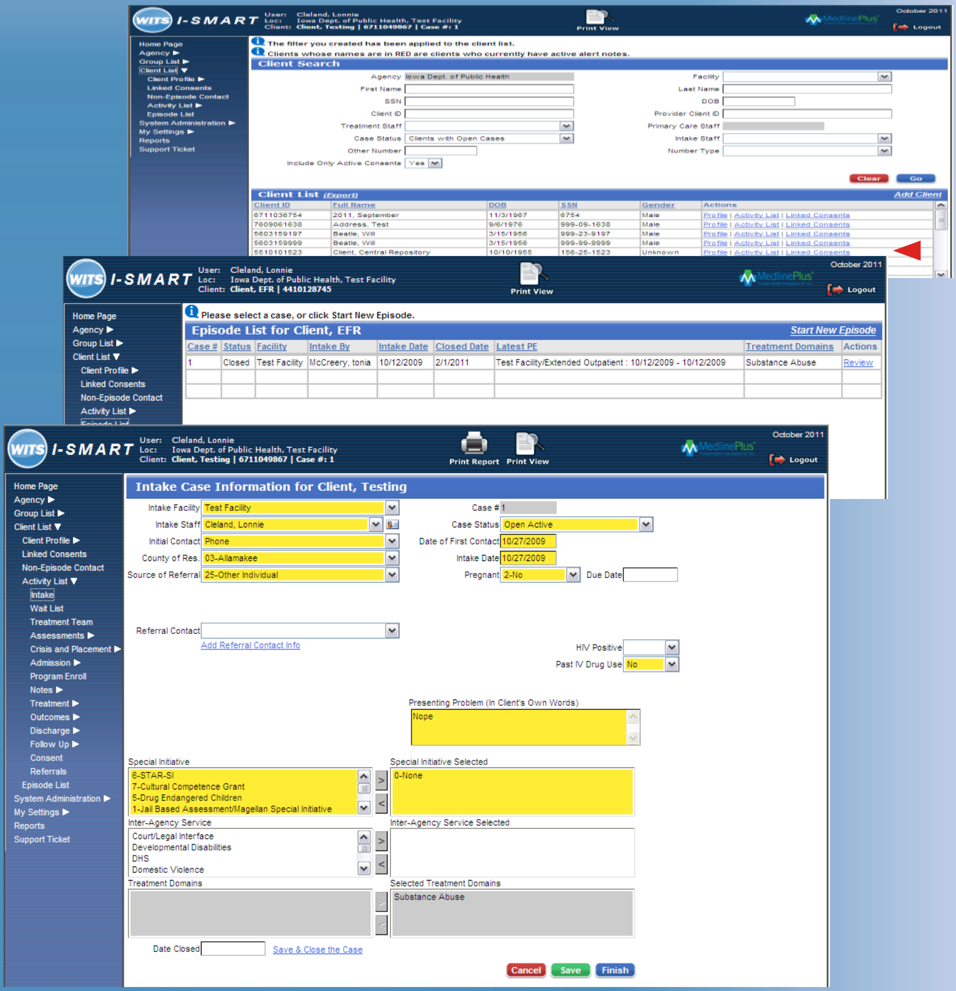
45. Click on the **Start New Episode** link to do a new intake and thus, start a new episode. This will take you to the **Client Intake** screen.

46. Check the information in the top portion of the screen which comes pre-filled, and edit if appropriate. Select appropriate options from the drop-down fields. Type in the details of the **Presenting Problems**.

47. Complete the remaining sections if applicable.

48. Click **Finish**. **Finish** will take you to the client's **Activity List** screen. You have now opened a case for the client.

Note: For clients who do not go through only the assessment/Placement Screening process and do not need a discharge record you can close the case on this screen. To close the case, enter a date in the **Date Closed** field and click the **Save & Close the Case** hyperlink.



Add Client

Intake

49. Verify **Client Profile** and **Intake** activities are complete in the **Episode Activity List** screen.

50. You may continue with another activity using the left menu to start another task.

51. The **Activity List** shows all the clinical activities started or completed for a client.

52. Notice the **(Details)** hyperlink next to the In Progress Status note. Clicking this hyperlink will open a window showing what state-required information has been left undone. To complete the required information simple click the appropriate **Review** link and go to the screen where the information resides. In this case, you would go to Client Profile/Contact Info/**Add Address**.